

## Message Text

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TAGS: EAGR, EEC

SUBJECT: EC GRAIN CROP ESTIMATES

REF: EC BRUSSELS 5758

1. SUMMARY: THE REPORT ON CROP CONDITIONS JUST RELEASED BY THE EC STATISTICAL OFFICE PREDICTS THAT THE 1976 GRAIN CROP WILL BE BELOW THE POOR 1975 CROP OF 97 MILLION TONS. OFFICIALS IN THE COMMISSION'S GRAIN DIVISION STATE THAT THIS IS ALSO THEIR LATEST READING OF THE SITUATION. HOWEVER, THEY NOW FEEL THAT THE 1976 CROP WILL BE ONLY SLIGHTLY BELOW 1975, AS OVERALL YIELDS DO NOT SEEM TO HAVE BEEN AS BADLY AFFECTED BY THE DROUGHT AS WAS INITIALLY FEARED. END SUMMARY.

2. THE EC S STATISTICAL OFFICE HAS JUST RELEASED A REPORT ON CROP CONDITIONS. HOWEVER, IT SHOULD BE NOTED THAT THE INFORMATION CONTAINED IN THIS REPORT IS OFTEN DATED. ALSO, THE DATA SUBMITTED BY THE MEMBER STATES ARE INCOMPLETE SMNCLN THUS, THE FIGURES HAVE NOT BEEN AGGREGATED ON AN EC-WIDE BASIS.

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3. THE REPORT NOTES THAT THE DEFICIT IN RAINFALL HAS BEEN

ENORMOUS IN MOST REGIONS OF THE COMMUNITY AND CATASTROPHIC IN CERTAIN AREAS. GRAINS HAVE REACHED MATURITY TOO SOON. OVERALL, THE STATISTICAL OFFICE EXPECTS THAT THE 1976 GRAIN HARVEST WILL BE LESS THAN THE POOR 1975 GRAIN HARVEST OF 97 MILLION TONS.

4. WE DISCUSSED THE REPORT OF THE STATISTICAL OFFICE WITH OFFICIALS IN THE COMMISSION'S GRAIN DIVISION. (IT SHOULD BE NOTED THAT THE STATISTICAL OFFICE'S CROP ESTIMATES ARE MADE INDEPENDENTLY OF THE COMMISSION'S GRAIN DIVISION AND ARE BASED ON OFFICIAL MEMBER STATE SUBMISSIONS. SMNCLN THE GRAIN DIVISION, ON THE OTHER HAND, MAKES IN-HOUSE QTE WORKING ESTIMATES UNQTE BASED ON DISCUSSIONS WITH MEMBER STATE REPRESENTATIVES AND SOURCES IN THE TRADE.) THEY REMINDED US THAT THE STATISTICAL OFFICE ESTIMATES WERE USUALLY SOMEWHAT DATED. THEIR VIEW, BASED ON DISCUSSIONS WITH MEMBER STATE AND TRADE REPRESENTATIVES AT THE END OF LAST WEEK, WAS THAT THE 1976 CROP WOULD BE SLIGHTLY BELOW 1975. THE LATEST THINKING IS THAT THE EFFECTS OF THE DROUGHT ON GRAIN YIELDS WILL NOT BE AS BAD AS WAS ANTICIPATED EARLIER. THEY GAVE THE FOLLOWING ESTIMATES, (WHICH ARE AGGREGATES OF MEMBER STATE ESTIMATES) CAUTIONING THAT THEY WERE EXTREMELY ROUGH (1975 PRODUCTION IS SHOWN IN PARENTHESES):

MILLION TONS

SOFT WHEAT      35.7 (34)

BARLEY          31-31.5 (32.2)

CORN            12 (14)

THEY EMPHASIZED THAT THE FIGURES ON CORN WERE PARTICULARLY WEAK. THEY FELT SURE THAT THE CORN CROP WOULD BE DOWN VERY SUBSTANTIALLY IN FRANCE ALTHOUGH IT WAS DIFFICULT TO TELL HOW MUCH THE RECENT RAINS MIGHT AMELIORATE THE EFFECTS OF THE DROUGHT. ALSO, THEY SAID THAT NOT ENOUGH INFORMATION HAD YET BEEN RECEIVED TO MAKE A DECENT ESTIMATE OF THE ITALIAN CORN CROP. THEY ALSO FELT THAT THE FIGURE ON WHEAT WAS TOO HIGH. SMNCLN THE 1976 CROP SHOULD BE CLOSE TO THAT OF 1975.

5. COUNTRY-BY-COUNTRY HIGHLIGHTS OF THE STATISTICAL OFFICE  
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REPORT ARE SHOWN BELOW:

GERMANY: THE LATEST ESTIMATE OF THE TOTAL GRAIN CROP IS 18 TO 18.5 MILLION TONS AS COMPARED WITH 21.3 MILLION TONS IN 1975. POTATOES AND SUGAR AND FORAGE BEETS ARE ALSO SAID TO HAVE SUFFERED SIGNIFICANT DAMAGE AS OF THE START OF JULY. THE FIRST CUT OF HAY AND SILAGE IS SAID TO HAVE BEEN RELATIVELY GOOD, BUT SUBSEQUENT GROWTH HAS BEEN PRACTICALLY NIL.

6. FRANCE. THE ESTIMATES OF THE 1976 GRAIN CROP ARE THOSE MADE ON JUNE 1, 1976. GRAIN AREA UP 5 PERCENT, GRAIN PRODUCTION (EXCLUDING CORN AND RICE) 27.8 MILLION TONS AS COMPARED WITH 27.2 IN 1975. THE REPORT STATES THAT THESE ESTIMATES ARE PROBABLY TOO HIGH. THE AREA IN POTATOES AND SUGAR BEETS IS ESTIMATED AT 292,000 HECTARES AND 620,000 HECTARES RESPECTIVELY (AS COMPARED WITH 309,000 AND 602,000 HECTARES IN 1975). THE DROUGHT IS SAID TO HAVE HAD CATASTROPHIC EFFECTS ON FORAGE SUPPLIES.

7. ITALY. THE 1976 WHEAT HARVEST IS ESTIMATED AT 9.34 MILLION TONS (9.62 IN 1975) OF WHICH 5.84 CONSISTS OF SOFT WHEAT AND 3.5 OF DURUM WHEAT. THE RICE HARVEST IS EXPECTED TO EQUAL OR SURPASS THE 1975 LEVEL. THE EARLY POTATO HARVEST IS ESTIMATED AT 370,000 TONS, SLIGHTLY BELOW THE 1975 LEVEL. THE ABOVE CROP ESTIMATES SEEM TO HAVE BEEN BASED ON INFORMATION AVAILABLE AS OF THE END OF JUNE. THE REPORT INDICATES THAT CROP CONDITIONS IN THE NORTH OF THE COUNTRY HAVE DETERIORATED AS A RESULT OF THE DROUGHT SINCE EARLY JUNE.

8. NETHERLANDS. AREAS PLANTED ARE NOT YET KNOWN. THE EFFECTS OF THE DROUGHT ARE SAID TO HAVE WORSENED THROUGHOUT JUNE. GRAINS ARE SAID TO HAVE SHORT STRAW, IRREGULARLY-SIZED HEADS AND TO HAVE MATURED TOO SOON. DEPENDING ON TYPE OF SOIL, THE DEVELOPMENT OF POTATOES IS RATED POOR TO MEDIOCRE. AN ESTIMATED 9 PERCENT OF THE SUGAR BEETS HAVE HAD TO BE RESEEDING AND THUS ARE ABOUT A MONTH BEHIND IN GROWTH. FORAGE PRODUCTION IS SAID TO BE ONLY 40-80 PERCENT OF NORMAL PRODUCTION DEPENDING ON THE REGION. THE GROWTH OF GRASS HAS BEEN PARTICULARLY POOR ON SANDY SOILS.

9. BELGIUM. THE OUTLOOK FOR WINTER GRAINS IS SAID TO BE UNCLASSIFIED

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RELATIVELY FAVORABLE. THE HARVEST OF WINTER BARLEY IS EXPECTED TO REACH 0.6 MILLION TONS (0.4 MILLION TONS IN 1975). AN AVERAGE TO POOR HARVEST OF SPRING GRAINS IS EXPECTED DEPENDING ON REGION AND TYPE OF SOIL. THE POTATO AND SUGAR BEET CROP HAS BEEN SERIOUSLY AFFECTED BY THE DROUGHT.

10. LUXEMBOURG. JUNE PRECIPITATION WAS ONLY 7 PERCENT OF NORMAL. 80 PERCENT OF THE GRAIN HARVEST IS REPORTED LOST. HAY PRODUCTION IS ONLY 50 PERCENT OF NORMAL.

11. UK. DESPITE DAMAGE IN THE SOUTH AND EAST, THE OUTLOOK WAS GENERALLY FAVORABLE AT THE START OF JULY. HIGHER YIELDS

ARE EXPECTED FOR WINTER WHEAT AND WINTER BARLEY. THE SITUATION

IS LESS FAVORABLE FOR SPRING BARLEY AND OATS. THE GRAIN HARVEST IS EXPECTED TO EXCEED 14 MILLION TONS AS COMPARED WITH 13.8 MILLION TONS IN 1975. THE AREA IN POTATOES AND SUGAR BEETS IS ESTIMATED AT 186,000 AND 207,000 HECTARES RESPECTIVELY AS COMPARED WITH 204,000 AND 198,000 IN 1975. POTATO YIELDS ARE EXPECTED TO BE EQUAL OR HIGHER THAN THE POOR 1975 YIELDS WHILE AN AVERAGE HARVEST OF ABOUT 60 MILLION TONS OF SUGAR BEETS IS ANTICIPATED.

12. IRELAND. PRECIPITATION IS SUFFICIENT AND NORMAL YIELDS ARE EXPECTED. DATA ON AREAS PLANTED OR ESTIMATED YIELDS ARE NOT YET AVAILABLE.

13. DENMARK. NO RAIN WAS REPORTED IN THE PERIOD JUNE 21 TO JULY 5. YIELDS ARE EXPECTED TO BE 3 PERCENT LESS THAN NORMAL FOR WINTER GRAINS AND 5-6 PERCENT LOWER FOR SPRING GRAINS AND ROADQUFORAGE PRODUCTION IS EXPECTED TO BE 15 PERCENT BELOW NORMAL AND AS OF THE START OF JULY, THE REGROWTH OF GRASS HAS STOPPED. AREA PLANTED IN GRAINS IS 3 PERCENT ABOVE LAST YEAR. HINTON

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